Trainer's Notes

W-2 Case Management and You – Virtual Classroom

Purpose
The purpose of this course is to provide FEPs/Case Managers with strategies for effective time management, healthy boundaries, and practicing self-care.

Objectives:
Upon completion of this course you will be able to:

- Describe how to prioritize the ongoing tasks required in W-2 case management;
- Apply strategies to maximize your time and work more effectively with customers;
- Establish and maintain professional boundaries when working with W-2 participants;
- Identify your support network; and
- Describe the links between self-care and effective case management.

Table of Contents

TABLE OF CONTENTS **2**

INTRODUCTION – DAY ONE **4**

ESTABLISHING A FOUNDATION FOR SUCCESS AS A CASE MANAGER **6**

TIME MANAGEMENT **6**

Prioritization – Getting Started 7
Know Where Your Time Goes 8
Make a List 10
Effective Scheduling 13
Dealing with Unexpected Downtime 17
Quick Tasks 18

PROFESSIONAL BOUNDARIES **19**

Perceptions 19

DAY 1 WRAP UP – SIMILE SENTENCES **20**

DAY 2 OPENING: PROFESSIONAL BOUNDARIES **20**

Zone of Helpfulness 22
Boundary Violations 26
Tips for Setting Professional Boundaries 28

SELF-CARE **29**

Self-Care Strategies 31
Deep Breathing & Mindfulness 32
Prioritizing Self-Care 33
Connections 33

CLOSING **35**

Sentence Prompts 36

Materials Needed

- Course PPT located on the ECM curriculum page
- YouTube video (https://www.youtube.com/watch?v=F5JI_6nsgaM), from beginning to 3:13
- YouTube video (https://youtu.be/czh4rmk75jc)
- PROQOL Self-Assessment document located on the ECM curriculum page
- Prior to Day 2, create Polling Questions in Zoom for the What Do You Think? Activity
- 15-minute YouTube timer with relaxing music
- 5-minute You Tube timer with relaxing music
- Completed Why Cube to show as an example
- Polling questions for What Do You Think? Activity
- Trainer Toolkit - Optional

Suggested Pace

This is a 6-hour course. The following agenda is the suggested pace.

Day 1

9:00 – 9:15: Introduction	1:00 – 1:15
9:15 – 9:45: Prioritization: Getting Started	1:15 – 1:45
9:45 – 10:20: Eisenhower Matrix Activity	1:45 – 2:20
10:20 – 10:35: Break	*2:20 – 2:35*
10:35 – 11:05: Prioritization in Practice Part 1	2:35 – 3:05
11:05 – 11:35: Prioritization in Practice Part 2	3:05 – 3:35
11:35 – 11:45: Professional Boundaries: Perception	3:35 – 3:45
11:45 – 12:00: Day 1 Wrap-Up – Simile Sentences	3:45 – 4:00

Day 2

9:00 – 9:20: Perceptions Continued – Can You Solve It?	1:00 – 1:20
9:20 – 9:50 Zone of Helpfulness	1:20 – 1:50
9:50 – 10:15: Boundary Violations	1:50 – 2:15
10:15 – 10:30: Break	*2:15 – 2:30*
10:30 – 10:45: Tips for Setting Professional Boundaries	2:30 – 2:45
10:45 – 11:00: Self-Care	2:45 – 3:00
11:00 – 11:15: Self-Care Strategies	3:00 – 3:15
11:15 – 11:45: Prioritizing Self-Care	3:15 – 3:45
11:45 – 12:00: Closing	3:45 – 4:00

☼ PPT 1

Introduction – Day One

Welcome to W-2 Case Management and You. In this class, we focus on strategies to help you enhance your W-2 case management skills. You will have opportunities to network with your peers, share your own best practices, and put these strategies into practice.

Note to Trainers: Turn on your webcams and introduce yourselves prior to starting the Zoom walkthrough.

☼ PPT 2

Throughout this class, we use several different features in Zoom.

☼ PPT 3

Access the chat feature by clicking on the Chat button at the bottom of your screen. This opens a conversation pane in your window.

☼ PPT 4

Depending on your version of Zoom, you can access additional features by clicking on Participants or Reactions at the bottom of your screen. From here, you can use various buttons to provide us feedback.

☼ PPT 5

Sometimes, we'll ask you to mark on the screen using annotations. To access annotations, click View Options at the top of your screen. Select Annotate to open the annotation toolbar. The stamp annotation is one we plan to use. Another annotation we plan to use is text. Use this to type text on the screen. After selecting the text annotation, use the format button to change the color or size of your text. To stop using annotations, click the X button on the right-hand side of the annotation toolbar.

Note to Trainer: Learners do not need to make annotations during the walkthrough. However, if any learners have added annotations, clear these before moving on.

☼ PPT 6

You'll have a chance for some discussion in small groups during this class. When we send you to a breakout room, you'll see this window pop up. Then, you and other learners will join the room. Feel free to turn on your webcams during this time if you have them. If you need help from a trainer, click the Ask for Help button to invite the host. When your time is up in the breakout room, Zoom automatically brings you back to the main session. If you leave the breakout room sooner, be sure to choose the option to leave the room and not the meeting.

Let's start by getting to know a little bit about ourselves and each other.

Gallery Walk Self-Assessment

☼ PPT 7

Purpose: Learners employ a quick needs assessment and acknowledge the strengths, skills, interest, and expertise of themselves and others.

Estimated Length: 5 minutes

Directions to Trainer: Learners use the stamp annotation tool to mark any boxes that apply to them.

Trainer Instructions to Learners: Read the statements on each box on the screen. If the statement applies to you, use your stamp annotation tool to stamp inside the box. Remember, you access the stamp annotation tool by clicking View Options, Annotate, and then Stamp.

Debrief Questions: What do you notice about the groupings of stamps on the screen?

Which of these statements could be a strength for a W-2 Case Manager?

Looking at the groupings of stamps on the screen, what are some strengths folks in this class possess?

Note to Trainer: We anticipate learners will notice the distribution of the stamps in the boxes, which will vary by class. Are they evenly distributed? Are there many stamps in one category and few or none in another? Clear annotations before moving on.

Establishing a Foundation for Success as a Case Manager

PPT 8

PG 4

Employing effective strategies for managing your time, setting professional boundaries, and practicing self-care are fundamental to succeeding in your role in helping participants.

PPT 9

Although each of these areas is important on its own, they overlap, as practicing good time management allows you to practice self-care, which includes setting professional boundaries to maintain a healthy work life balance. Remember, you are at the center of these strategies, and practicing each of them leads to you being an effective case manager.

Throughout the training today and tomorrow, we'd love to hear your tips, tricks, and tools on the topics we are discussing. At any point, if you think of a best practice, please type it in the chat to share with the class.

Time Management

PPT 10

PG 5

Time management refers to the practice of reviewing all your tasks or activities, estimating how long you will spend on each one, and prioritizing the order in which you complete them. Let's take a look at how each of us prioritizes these common morning tasks.

In Which Order Activity

PPT 11

Purpose: Learners see how tasks are prioritized differently based on personal preference.

Estimated Length: 10 minutes

Directions to Trainer: Ask learners to state the order in which they complete the following tasks: brush teeth, make the bed, and eat breakfast. The trainer records learners' responses on the PPT by using the stamp annotation tool.

Trainer Instructions to Learners: When I call your name, unmute and let us know in what order you complete the following after waking up in the morning: brush your teeth, make the bed, and eat breakfast.

Note to Trainer: Go down the participant list until everyone has answered.

Debrief Question: What observations can you make from looking at the chart?
Answer: People complete these tasks in different orders; some people choose not to complete certain tasks, or may do the same task twice (such as brush their teeth before and after breakfast).

Even though we may find all these morning tasks important, we ranked them differently based on individual preference, giving one task priority over the others. We do the same with work-related tasks; however, W-2 has policies to consider when deciding what tasks are a priority.

Today we start by discussing some specific prioritization strategies that can help you be more effective as a Case Manager. Later we dive into setting professional boundaries and taking care of yourself.

Note to Trainer: Clear annotations before moving on.

Prioritization – Getting Started

PPT 12

Prioritization is a process of assessing tasks and ranking them in order of importance or urgency. It is an essential skill that can help you:

- Reduce *stress*;
- Save *time*;
- Manage multiple *deadlines*;

PPT 13

- Bring order to your day; and
- Move toward an *effective* *conclusion* to your daily tasks.

Ask What does your workday typically look like in terms of what needs to be accomplished or what types of appointments you have? You can unmute yourself or type in the chat to respond.

Note to Trainer: If the class consists of learners in New Worker Training who do not yet have appointments, rephrase the question to ask about the typical workday of a Case Manager in their agency, or what they expect their typical workday to look like when they have a caseload.

Many of you may complete similar tasks, but your co-workers might prioritize their day differently than you do.

Sometimes we set our priorities based on personal preference, such as what we do after waking up; but at work, we need additional strategies to be more efficient.

Often, everything that you must do seems like a top priority, which makes it tough to figure out where to begin. It can be appealing to complete a task that you like or can get done quickly, even though it is not as important as other tasks.

Let's review some strategies that can help you with prioritization.

Know Where Your Time Goes

☼ PPT 14

Have you ever had a day go by so quickly that you didn't know where it went? Read the question at the bottom of page 5 in your participant guide. In a moment we will send you to breakout rooms to answer this question. The person in your group with the longest hair will be the scribe and reporter for your group. You have 4 minutes.

Question: What are some distractions that draw your attention away and cause you to stop what you're doing?

Note to Trainer: Divide class into groups of around 4 people. Breakout rooms will remain the same throughout the class. Send learners to breakout rooms for 3 minutes, with an additional 1-minute countdown. During the report out, the trainer compiles a master list of responses on screen using the text annotation tool.

☼ PPT 15

Ask groups to share their responses.

Possible responses:
- *Emails*
- *Phone calls*
- *Being unorganized, including shuffling through papers or looking for something*
- *Socializing/chit-chat*
- *Social media*
- *Spending too much time on a task (unneeded perfectionism)*

According to a study by Dr. Gloria Marks, people interrupt themselves about 44% of the time.

That means you are causing almost half of your distractions throughout the day.

Ask Which of these distractions from your list do you have control over? Unmute or type your response in the chat.

Note to Trainer: Trainer uses the stamp annotation tool to mark the onscreen responses learners mention.

Possible responses:
- *Emails – turn off the alert sound, allocate specific time to check your inbox*
- *Surfing the internet or spending time on social media*
- *Taking unneeded breaks*
- *Being unorganized*

Research by CubeSmart found that 73% of interruptions generally are handled immediately, whether or not they need to be. This means that we need to be better at identifying whether a distraction is important enough to become a priority. For instance, you may not answer the phone if you are typing PIN Comments because you may lose your train of thought or have to switch pages based on the caller's needs. But, if you are scanning through emails, you may decide that answering the call is a priority.

Note to Trainer: Clear annotations before moving on.

Time Management Activity

☼ PPT 16

PG 6

Purpose: Learners visualize and put into practice how prioritizing their tasks can make a difference in their day

Materials: YouTube video (https://www.youtube.com/watch?v=F5JI_6nsgaM)

Estimated Length: 15 minutes

Directions to Trainer: Show the YouTube video. Send learners to breakout rooms for 5 minutes, with an additional 1-minute countdown.

Trainer Instructions to Learners: We are going to watch a short video. When it's done, we will send you to breakout rooms to answer the questions on page 6 in your participant guide. Let's watch the video.
Additional Trainer Instructions to Learners: You have 6 minutes to work with your group to answer the questions on page 6. The person in your group with the most siblings will be the scribe and reporter.

Questions:
1. What stuck out to you in that video?
Answers will vary

2. Thinking about case management specifically, what do the rocks represent? Pebbles? Sand?
Rocks – appointments with participants, workshops, etc.
Pebbles – PIN comments, outreach, scheduling, scanning, worker tasks, etc.
Sand – emails, voicemails, reports, etc.

3. How can this translate to your daily work?
Answer: Focus on the "big stuff" first, and then fill in the rest as able

Note to Trainer: Advance to ☼ PPT 17 while learners are in breakout rooms.

I'd like each group to share one item you discussed when answering these questions.

Make a List

☼ PPT 18

Time management is one way to help you prioritize your day as a Case Manager, another helpful aspect of prioritization is making a list. **Ask** How many of you use a To-Do List? Using the reactions tab, give me a thumbs up if you do and a thumbs down if you don't.

Note to Trainer: After about one minute has passed, clear the reactions.

For those of you who use one, how often do you update your To-Do List? Unmute or type your response in the chat.

Keeping a daily To-Do List helps you visualize everything that needs to be completed, and then prioritize those tasks.

It is important to assess the value of each task when prioritizing them. For instance, not meeting W-2 program timelines has bigger consequences than not doing some other tasks on your list. Use a numbering, or other type of, system to assign priority.

A To-Do List needs to be flexible to accommodate unexpected tasks, such as a participant in a situation requiring immediate attention. You need to balance providing customer service with your other priorities. This means handling important situations right away, but not dropping everything to meet with a participant who is just handing in activity sheets. Remember, you are the one to determine your priorities and what constitutes an emergency.

Keep in mind, you probably won't get to everything on your list, especially if unexpected tasks are added that take priority. After identifying the most important tasks to complete that day and estimating how much time they will take, move the rest from this list to another day.

Brainstorm Blast & Eisenhower Matrix Activity

PPT 19

Purpose: Learners practice prioritizing tasks using the Eisenhower Matrix

Materials: YouTube video (https://youtu.be/czh4rmk75jc)

	Important	Not Important
Urgent		
Not Urgent		

Estimated Length: 15-20 minutes

Directions to Trainer: Divide learners into groups of about 4. Instruct groups to brainstorm different types of tasks they typically complete in a workday, week, or month. Encourage learners to write down on a blank sheet of paper all the things they do, including unexpected tasks and non-work-related tasks or distractions that may arise. Send learners to breakout rooms for 4 minutes, with an additional 1-minute countdown.

Show learners the YouTube video (How to Prioritize…), which explains the Eisenhower Matrix. (3 minutes)

Following the video, categorize the pre-determined tasks as a large group, using the Eisenhower Matrix. (5 minutes)

Trainer Instructions to Learners: In a moment we will send you to breakout rooms. Work with your group to brainstorm all the tasks you do in a typical workday, week, or month. Include scheduled work tasks, unexpected tasks, and potential distractions. You have 5 minutes.

☼ PPT 20

Now we are going to watch a short video describing a strategy called the Eisenhower Matrix. While you watch the video, think about how you would categorize the tasks you came up with in your breakout rooms.

☼ PPT 21

Ask What are some of the tasks you came up with in your groups? Unmute or type your answers in the chat.

Note to Trainer: While the speaking trainer is asking the question, the trainer sharing their screen will use the Pause Share feature and add the following pre-determined tasks listed below to the slide using the text annotation tool. The items should be added separately, so that they may be moved around the screen independently. Use black text with a large enough font to be readable. You may choose to add items from learners' lists if they have additional tasks not included in the pre-determined list.

Tasks: Participation Tracking, Outreach, Meeting with Participants, Keeping Up with Training, Emails, Voicemails, Checking Facebook, Scanning, POP Claims, Pulling Job Leads, Checking Weather, Decorating Office Space

PG 7

Now that you've watched the video with tips on how to prioritize, let's categorize some tasks together.

Note to Trainer: Use the text annotation tool to sort the tasks on the PPT screen into the matrix. Ask for learners' input as you sort. If time allows, sort any additional tasks groups came up with that are not listed on the screen.

Debrief Questions: Encourage learners to unmute or type responses in chat. (5 minutes)

1. What was it like to categorize the tasks using the Eisenhower Matrix?

2. How difficult was it to think of all the tasks you do in a day, week, or month?

3. What is the value in using a tool like this to prioritize tasks?

4. How could you use this tool in your daily work life?

   Possible Responses: This could help schedule and plan when to complete daily and weekly tasks. This could be used during staff meetings or at meetings between workers and supervisors to make sure everyone is on the same page regarding priorities.

Note to Trainer: After debriefing, clear all annotations.

Effective Scheduling

☼ PPT 22

Organization requires more than just prioritizing your tasks; you also need to find an effective way to schedule them. This helps you manage your time more efficiently. You can get more done and are less likely to *forget* tasks or become sidetracked.

It is important to allow *enough* time in your schedule to complete all work related to that task or appointment. For instance, an appointment with a participant includes both the time they are in your office, and the time you spend preparing for the appointment, entering comments, reviewing WWP entries, etc.

Also, *keeping* some time open in your schedule each day allows you to plan for the unexpected. This could be accomplished by keeping your first or last hour of the day open so you always have room to schedule an important appointment, respond to emails or voicemails, or take care of any tasks that took longer than you planned.

Most email programs, such as Microsoft Outlook, have calendars you can use for scheduling, as well as a place to create a task list or To-Do List. Additional features can be used to set reminders or color code activities. The tools section of the participant guide includes some helpful tutorial websites.

PPT 23

Find a system that works well for you when it comes to scheduling your tasks and appointments. Per policy, you must use Client Scheduling to schedule applicant and participant appointments. For more information on that, please see the Client Scheduling course in the Learning Center. However, some workers use additional tools to help with organization.

One Case Manager shared that she uses Microsoft Outlook to track all her appointments. She includes the participant's name, type of appointment, and phone number in the subject part of the appointment entry, but adds any special tasks to be completed in the comments section of the appointment entry. To quickly see what is happening in her day, this Case Manager takes advantage of the color-coding system by assigning a different color based on a participant's placement, such as green for CSJ. She changes the color of an appointment if the participant does not show or call to indicate she needs to follow up. This system allows her to mentally prepare for the day ahead and remind her what still needs to be completed.

Ask What strategies did this Case Manager use to organize her schedule? Unmute or type your responses in the chat.

Possible Responses: Color-coding, Adding specific information to the subject and details fields, Updating the entries

Ask What other tips do you have for Case Managers to help organize or prioritize their schedules?

Possible Responses: Be careful about putting confidential information in your calendars, especially if you are sharing your calendar with co-workers.

Prioritization in Practice Activity - Part One

PPT 24

PG 8

Purpose: Learners use prioritization tips while scheduling case management tasks.

Materials: Appointment information from PG 8, and calendar from PG 9

Estimated Length: 20 minutes

Directions to Trainer: This activity is divided into two parts. Groups use the calendar on PG 9 for both parts. Although a calendar is used to track this activity, the purpose is the thought process behind the decisions the groups make when creating the schedule. Do not focus on comparing schedules, but use them as a way to ask how groups decided how much time a task needed and chose what tasks were a higher priority. Groups share their calendars and rationale with the class. During the debrief, use annotation tools to display each appointment on the PPT calendar in a different color. Clear the annotated appointments between groups.

Part One of the activity focuses on practicing effective scheduling by assigning enough time for each appointment. Groups add appointments to their calendar for Monday, deciding for themselves how long the appointment will take. Emphasize that these are Monday's appointments, and cannot be added to any other day on the calendar. Send learners to breakout rooms for 9 minutes, with an additional 1-minute countdown.

Trainer Instructions to Learners: Now you can put the prioritization tips we just covered into practice. You will work with your group in a breakout room to prioritize and schedule daily case management tasks. Today is Monday, and you have four different appointments to fit into your schedule. Read through each appointment description on page 8 of your participant guide and schedule them on the calendar on page 9 of your participant guide. Right now, we are only looking at Monday. It is up to you to decide how much time is needed for each appointment. Be prepared to share your schedule and explain the rationale for your decisions. The most organized person in your group will be the reporter. You have 10 minutes to work on your schedule.

Note to Trainer: We want to stay away from stating things such as, "You should always schedule one hour for eligibility appointments." When it comes to time allotted for each appointment, it may help to speak in terms of what is optimal versus what is possible. For instance, it is possible to complete an eligibility appointment in 30 minutes, but is it the optimal amount of time?

Debrief Questions:

- What other tasks regarding these appointments do you need to take into consideration (in addition to just meeting with the participant)?

  Possible Responses: Comments, scanning, following up with third parties such as IM worker, worksite supervisor, doctor, etc.

- Did you allow time for this in the schedule?

Sit/Stand Energizer

Estimated Length: 5 minutes

Directions to Trainer: Read each statement below, asking learners to stand if that statement is true for them or sit down if the statement is not true for them.

Trainer Instructions to Learners: Before we practice what we've learned so far, take a moment and stand up at your station. I will read several statements. If a statement is true for you, stand up. If a statement is untrue for you, sit down.

Statements:
Stand if…
You consider yourself a very organized person.

You like color-coding.

You use an Outlook calendar daily.

You've learned a new tip today that you are going to try.

Prioritizing work tasks gives you a headache.

You have heard of the Eisenhower Matrix before today.

You like crossing items off a to-do list.

Prioritization in Practice Activity – Part Two

☼ PPT 25

PG 10 – 11

Purpose: Learners use prioritization tips to deal with unexpected schedule changes.

Materials: Appointment information from PG 10-11, and calendar from PG 9

Estimated Length: 30 minutes

Directions to Trainer: Part Two focuses on effective scheduling while assigning priority to tasks. Groups are faced with unexpected situations that need to be addressed.

Groups decide how to address the situations, determining which have higher priority, and where to fit them into the schedule for the week. Groups can schedule time for these tasks anywhere on the calendar, including Monday. Not every situation requires an appointment, but time still needs to be set aside to complete tasks such as entering comments, returning phone calls, etc. Send learners to breakout rooms for 14 minutes, with an addition 1-minute countdown. Groups do not report out their schedules for Part Two. Instead, check into each breakout room around the 10-15 minute mark and ask the group to briefly talk through what they have done so far. The purpose of the check in is for the trainer to make sure the group is on track and to see if they need assistance.

Trainer Instructions to Learners: Just like in real life, other situations will arise during the day that require your attention. These could be walk-ins, phone calls, emails, etc. For the second part of this activity, please refer to page 10 to see what else comes across your desk today. Allocate time on your weekly calendar to handle these unscheduled tasks, keeping in mind that some tasks may be a higher priority. Some tasks do not necessarily need an appointment, but you still need to allot time to complete them. If you choose to schedule a task later in the week, you will need to note any actions you have to take today. The appointments and tasks already scheduled for the week are blocked out on your calendar on page 9, and you will need to schedule around those. After finalizing your schedule, answer the questions on page 11. You have 15 minutes.

Debrief Questions: Encourage learners to unmute or type responses in the chat.

- How did your group approach the new tasks?
  Answers will vary.

- How did you use your downtime from the cancelled appointment?
  Answers will vary.

- Which decisions were easy for your group to make? Which decisions were more difficult for your group to make?
  Answers will vary.

- Who else could you connect the participant with to accomplish some of the tasks?
  Possible responses: Job Developer, Emergency Assistance Specialist, etc.

- What actions do you still need to take today for tasks you scheduled later in the week?
  Possible responses: Comments, Phone Calls, Schedule Future Appointments, Send email

Dealing with Unexpected Downtime

☼ PPT 26

PG 12

We often dream of having downtime at work, but when we get downtime, we don't know how to use it properly.

Note to Trainer: If necessary, refer to the activity where a participant cancelled her appointment, and how the class handled it.

Ask What expectations, if any, does your agency have for how you use your downtime? Unmute or type your response in the chat.

When you feel overwhelmed, it is easy to lose focus and not make the best use of your downtime.

You need breaks to stay balanced and effective; however, keep in mind your agency's policies on breaks and the need to respect your co-workers' time. Not everyone in the office takes a break at the same time. You do not want to become a distraction for your co-workers.

Ask What are some tasks you can complete in your downtime? Unmute or type your response in the chat.

Possible responses:

- *Re-visit your To-Do List*
- *Review your schedule for tasks you were unable to finish or for upcoming tasks that may need some preparation*
- *When finishing entries from an earlier appointment, take a step back to look at the file and make sure you remember everything that went on before entering comments*
- *Have a standard list of quick tasks that could be completed*
- *Get organized*
- *Plan out your future schedule*
- *Increase your knowledge*
- *Catch up or get ahead*
- *Tackle the tasks that always seem to get put on the back burner*

Note to Trainer: If you feel the class needs additional help identifying which tasks are higher priority, it may help to ask what they think are back burner tasks.

Quick Tasks

PPT 27

PG 13

Review the list of quick tasks in the participant guide.

Use the list to identify tasks you could complete when you have 15 minutes or less of downtime, and when you have about 30 minutes of downtime. After you have identified the amount of time these tasks take in your participant guide, use your stamp annotation tool to mark the appropriate boxes on the screen.

It may be helpful to keep this list handy as a reference when unexpected downtime occurs.

Add your own quick tasks at the bottom of the list in your participant guide.

Ask What tasks did you add? Unmute or type your response in the chat.

Note to Trainer: Use the text annotation tool to add the new tasks to the quick tasks section of the screen.

Possible responses:

- *Print documents you use regularly so you have them readily available for the next week or two*
- *Follow up on POP claims or verification needed*
- *Reschedule appointments that did not show*
- *Send out or follow up on releases, formal assessments, etc.*
- *Make sure you have scheduled time for upcoming eligibility reviews*
- *Call a worksite to check on a participant's progress*
- *Review worker tasks*

Note to Trainer: Clear annotations before moving on.

Professional Boundaries

☼ PPT 28

Managing your schedule is just one example of setting a healthy boundary. Professional boundaries are essential in many jobs. This is especially true as a Case Manager, where you are working closely with individuals and families, and discussing sensitive, personal issues.

Perceptions

☼ PPT 29

PG 14

Before we set professional boundaries, we need to consider our perceptions. Our own perceptions and biases, and those of W-2 participants, impact our relationships, which can affect our boundaries. Ideally, we work together in an equal partnership toward the same goals. However, participants may perceive that we hold all the power.

Ask Why do you think they might feel that way? Unmute or type your response in the chat.

Possible responses:

- *You represent authority*
- *You have information*
- *You use specialized language (acronyms)*
- *You control the money (determine eligibility, decide placement, and make good cause determinations)*
- *Appointments take place in your space (you decide what time and how long)*
- *You ask the questions*
- *You're associated with the government*

Day 1 Wrap Up – Simile Sentences

☼ PPT 30

To close out our day, we'd like you to create a simile sentence by filling in the blanks to one of the sentences on the screen. Here is an example, "Time management is like <u>cooking</u> because <u>it takes a lot of practice before you can do it effortlessly, but it's worth it in the end</u>." You have 5 minutes to come up with your simile, and then we will ask everyone to share their sentence.

Note to Trainer: Play quiet, relaxing music for 5 minutes. After 5 minutes have passed, go through the participant list, asking each person to share their simile sentence by unmuting. If learners do not have audio, they can type their sentences in the chat.

Day 2 Opening: Professional Boundaries

Note to Trainer: Prior to start of class, show ☼ PPT 31 annotated with class roster and icebreaker question.

☼ PPT 32

PG 14

Welcome back to W-2 Case Management and You. Yesterday we covered time management, organization, and prioritization strategies. We also started discussing professional boundaries by looking at perceptions. Today we continue talking about establishing healthy professional boundaries, and examine self-care strategies for case managers.

Can you solve it?

Purpose: To see how biases impact our perceptions.

Materials: The Monkey Business Illusion video clip for the second part of the activity: https://www.youtube.com/watch?v=IGQmdoK_ZfY

Estimated Length: 20 minutes

Directions to Trainer: Part One – Learners will attempt to guess the rule or pattern a sequence of numbers follow by proposing their own number sequences. The trainer will tell them if their sequences follow or do not follow the rule. The answer is that the numbers are in ascending order. Keep going until a learner guesses the correct answer, or until learners have guessed incorrectly for 5 minutes.

Part Two – Show learners The Monkey Business Illusion video in the PPT.

Trainer Instructions to Learners: I'm going to give you a three-number sequence, and I have a rule in mind that these numbers obey. I want you to try to figure out what that rule is. You can get information by proposing your own set of three numbers, to which I will say, 'Yes, that follows my rule' or 'No, that doesn't follow my rule'. If, at any time, you think you've figured out the rule, let us know. Here are the three numbers: 2, 4, 8. Unmute, or type your own three number sequence in the chat, and I will let you know if it follows my rule.

Note to Trainer: If learners have not guessed the correct answer within 5 minutes, provide them with the answer.

Usually when people try to solve this puzzle, they look for number sequences that fit the pattern, instead of looking for sequences that do not fit the pattern. This is a type of bias called a confirmation bias. This type of bias can impact our perceptions, because it leads us to look for confirmation of our initial beliefs or assumptions.

☼ PPT 33

Let's watch a short video that deals with unconscious bias and our perceptions.

Debrief Questions:

- Did anyone notice the gorilla? Give me a thumbs up with your reactions if you saw the gorilla.
- Did anyone notice the participant who left or the curtain changing color? Give me a thumbs up with your reactions if you noticed either of these before they were pointed out in the video.
- For those of you who did not notice all these occurrences, why do you think you missed them?
    - *Possible Responses: I was focused on counting the passes, That's not what I was looking for, I wasn't expecting to see those things*

When working with W-2 participants, we need to be conscious of our potential biases, and make sure we are not solely trying to confirm our initial beliefs, or only see what we are looking for or expecting to see.

- Have you ever experienced a time when your original perception of a W-2 participant was proven wrong? If you have, raise your hand using the Reactions or Participants tab. How did this impact the relationship?

It's important to be aware of our perceptions, and the impact they have on W-2 participants. Even though it may be easier to empathize with some rather than others, we need to treat all fairly. Always consider how your perceptions may impact your impartiality. This does not necessarily mean treating everyone equally. For example, although you apply policy rules equally, you do not provide everyone with the same accommodations. These are applied based on individual needs and strengths. Look at the equality versus equity image in your participant guide. In the first image, you can see that treating everyone equally is not the fair thing to do. In the second image, we see that treating everyone according to his or her individual needs is more equitable.

Zone of Helpfulness

☼ PPT 34

PG 15

In addition to our perceptions impacting our professional boundaries, we also need to remain in the zone of helpfulness to maintain healthy boundaries. We must decide to be neither under-involved nor over-involved in our participants' lives. If we are under-involved, we run the risk of not listening to participants or not even providing services. Yet if we are over-involved, we may not exhibit good judgement, and we are not helping participants to help themselves.

What Do You Think? Activity

Let's practice staying in the zone of helpfulness by answering some questions that address situations where workers may be over- or under-involved with participants.

PPT 35

PG 16

Purpose: To generate and guide discussion on professional boundaries.

Materials: Pre-made polling questions

Estimated Length: 20 minutes

Directions to Trainer: Open polling questions one at a time. After all learners have answered, or 20 seconds have passed, share the results.

Trainer Instructions to Learners: We are going to answer some true or false polling questions. You can find the statements on page 16 of your participant guide. When you see a poll pop up on your screen, select and submit your answer.

Note to Trainer: Provide the information in italics below each statement if needed for clarification based on learners' responses. For example, if learners all choose the correct response, no additional clarification may be needed. However, if there are any incorrect answers, it is advisable to provide the italicized information.

1. A worker never should accept a gift from a participant.
   True. Accepting gifts can be seen as role reversal, shifting the focus of the relationship from participant to worker.
2. Participants always should be informed about how the worker will deal with confidential information about their life.
   True. Participants have the right to be informed who will see their information and why those individuals will see the information.

3. It is permissible for a worker to have lunch with a participant to discuss the case in a less formal setting.
   False. Keeping a boundary around where worker-participant interactions take place avoids concerns about participant confidentiality, who prepares or pays for the meal (potential power issue), appearance of favoritism, etc.

4. A worker who has been assigned a participant they know socially should notify their supervisor.
   True. This is a conflict of interest as well as potentially causing boundary conflicts. Any time a worker is assigned a case involving a friend, the case should be transferred to a worker who does not in any way have social contact with the participant.

5. A worker never should give a participant his or her home phone number.
   True. Worker-participant interactions should take place in a work context, which is usually in an office during office hours. (One exception: agency after-hours or on-call policies)

6. A worker may date a participant if two years have passed since the participant received services.
   True. Although this is true, it is not at all recommended. It can be construed as a conflict of interest. Also, if the participant needs services in the future, the participant must seek services from someone else (which can be a problem in small counties). Whether the romantic relationship works or doesn't work, the participant's access to certain services may be limited.

7. If a participant verbally threatens a worker, the worker should accept that it is part of the job.
   False. Threats that could escalate to physical harm need a higher level of response and should follow agency policy and practice.

8. If a participant invites a worker to a family wedding, it is acceptable for the worker to attend.
   False. In general, seeing participants outside of work violates the intent of the worker-participant relationship: to provide services to the participant.

9. If a participant dies, the worker may attend the service if they do not disclose their relationship.
   True. The worker has a responsibility to maintain confidentiality for the sake of the participant and the participant's family.

10. It is okay to pay a participant reasonable wages to work for a W-2 worker (yard work, house cleaning, child care).

False. The worker's position of authority may make it difficult for the participant to refuse the request. The worker also may have a conflict about reporting participant income.

PG 15

Turn back to page 15 in your participant guide and review the questions at the bottom of the page.

Ask Does your agency have any kind of ethics or boundaries policies? Unmute or type your responses in the chat. For anyone who answered yes, what are some of your agency's policies?

Ask If you have a question about whether you potentially may be crossing a boundary, to whom would you go for advice?

Desk Stretches Energizer

Estimated Length: 5 minutes

Directions to Trainer: Turn on your webcam as you complete the stretches with learners. Invite learners to turn on their webcams if they are comfortable doing so.

Trainer Instructions to Learners: Before we discuss boundary violations, let's give our minds and bodies a brief rest. If you are able, please complete 10 quick desk stretches with me. If you'd like, feel free to turn on your webcam while we stretch. You can complete all these stretches while sitting.

1. The Elbow Pump: Raise your arm, then bring your hand down to touch your opposite shoulder blade. With your other hand, gently grab your elbow and pull it towards the opposite side. Switch arms.
2. The Knee-Jerk: While sitting, lift your leg up and grab onto your knee. Try and pull your leg towards your chest. Switch legs.
3. The Toe Toucher: While sitting, straighten your legs, and reach out to try and touch your toes.
4. The Ballerina: Lift your arm over your head and reach towards the opposite side. Switch arms.
5. The Backwards Clap: Put both of your hands behind your back with palms touching.
6. The I Don't Know: Raise both of your shoulders at the same time. Hold for a couple seconds, and then release.
7. The Bobble Head: Lean your head down, and slowly rotate your neck from left to right.

8. Touch the Sky: Interlock both hands together, and try to touch the sky, with palms facing the ceiling.
9. The Knee-Pump: Cross your leg, and gently push down on your knee. Switch legs.
10. The Neck Breaker: Take your hand and grab the opposite side of your head. Very gently, pull your head towards your shoulder. Switch sides.

Boundary Violations

PPT 36

PG 17

There are different types of boundary violations. We touch on a couple of them in detail today: *Self-Disclosure* and *Dual Relationships*.

Self-disclosure occurs when you reveal information about yourself to a participant. At times, this can be beneficial to share tips, strategies, and resources. It strengthens relationships by helping Case Managers and participants relate to each other. However, it should be used **only** if it will benefit the participant.

The best way to use self-disclosure is with a Motivational Interviewing technique called A-O-A.

PPT 37

A-O-A stands for *Ask* – *Offer* – *Ask*. This means that you first ask the participant if it's okay to share the information. Next, you offer the information. Finally, you ask the participant for their thoughts. Here's what it would sound like:

"You mentioned you're having some trouble with your son skipping school. Last year, I had some truancy issues with my son, too. Would you mind if I shared something that I found helpful?" (Ask) "The Family Resource Center provided free counseling and tutoring sessions. This really helped us both get back on track." (Offer) "Do you think that's something your family would be interested in?" (Ask).

PPT 38

Now that you know how to use self-disclosure in a more effective way, let's look at what to avoid.

Telling your life story - You can talk about pieces of your life that seem appropriate to the participant's situation without telling a long, drawn out story.

Too frequent personal references - Most of your time should be spent listening and encouraging participants to talk about themselves. You do not need to share a personal story every time one comes to mind.

Talking about your problems - Participants are coming to you for help. They don't want to be your counselor. Share solutions, options, and resources, not complaints.

Sounding condescending - An example of this is, "I've had jobs I didn't like either, but I sucked it up and stuck it out because I had to. You can, too." This sounds like you don't care at all about the participant's concerns.

Talking about resources that do not apply - Example: "I am so sorry you don't have any family support. When I went through my divorce, I really leaned on my mother, and she was a huge help with the kids."

PG 18

The other common type of boundary violation is dual relationships. Under most circumstances, it is unethical as a professional to have a dual relationship with a participant. In some situations, it is unavoidable, such as in rural areas, small communities, and cultural and ethnic communities. If you are faced with this type of situation, reach out to your supervisor for assistance.

PPT 39

Ask Which dual relationships have you encountered, or do you anticipate you may encounter? Use your stamp annotation tool to mark your responses on the screen.

Ask How can a dual relationship harm the W-2 participant and Case Manager's professional relationship? Unmute or type your response in the chat.

Possible responses:

- *Appearance of favoritism*
- *Confused boundaries*
- *Feels uncomfortable*
- *Participant may not want to disclose personal information*
- *Confidentiality concerns*

Note to Trainer: Clear annotations before moving on.

Ethical Scenarios Activity

☼ PPT 40

PG 19

Purpose: To practice decision making regarding potential boundary violations.

Materials: Ethical scenarios listed on page 19 of the PG. Scenarios are also listed in TN Appendix A.

Estimated Length: 20 minutes

Directions to Trainer: Learners will choose their own breakout room, based on the ethical scenario they would like to discuss. Name each breakout room after a scenario (Alaina, Kenzie, Darrel, Jayden). Scenarios also are listed in TN Appendix A. It is okay if groups are not evenly distributed, or some scenarios do not get picked. Schedule breakout rooms to close after 8 minutes, with an additional 1-minute countdown. If there is a room with only one learner, give the learner the option to work alone, or join a different room. If a large number of learners all join the same breakout room, you may divide the group into two separate breakout rooms for the same scenario.

Trainer Instructions to Learners: Take a couple minutes to quickly read through the scenarios on page 19 of your participant guide.

Choose which scenario you would like to discuss. In a moment, we will open up breakout rooms named for each scenario. Click to join the breakout room of your choice, and with your group, answer the questions corresponding to your scenario. The person in your group with the longest fingernails will be the reporter. You have 9 minutes.

Ask groups to share their responses.

Note to Trainer: If time allows, **ask** the large group how they would handle any scenarios that were not chosen by a small group. Potential issues to consider for each scenario are listed in italics after the scenario in TN Appendix A.

Tips for Setting Professional Boundaries

☼ PPT 41

PG 20

We've discussed why boundaries are necessary, but what about how to set them? Here are some tips for setting professional boundaries.

Communicate clearly – Know where your boundaries lie and be clear in sharing this information with others. How much easier would our lives be if everyone was upfront about their boundaries from the first time we met?

Practice saying no – If someone makes a request of you that violates one of your boundaries, it's okay to say no. Do not feel guilty, and do not feel obligated to explain your reasoning.

Create structure – Set agendas for meetings and hold to specific start and end times.

Be proactive – If you don't know what someone else's boundaries are – ask! This will avoid confusion or misunderstanding.

Set boundaries at home – Maintain a healthy work/life balance. Keep your work at work.

What's Your Tip?

☼ PPT 42

We want to hear your great ideas. **Ask** What tips do you have for setting professional boundaries? Use your text annotation tool to type your ideas on the screen. If you see an idea you really like, use your stamp annotation tool to mark it.

Note to Trainer: Trainers should move text around as needed for easy readability. Trainers may also add any ideas learners list in the chat on the screen. Clear annotations before moving on.

Self-Care

☼ PPT 43

Boundaries are an important component of self-care for Case Managers. The people we serve have complicated, and often overwhelming, issues and concerns. To help them through their journey, we must create a culture that values self-care. It's not always easy to take care of ourselves. Demands from work, family, and friends can downgrade self-care to the bottom of your To-Do List. But self-care is essential. It is not a sign of weakness. In fact, it is a way of making our minds and bodies stronger, enabling us to continue doing the important work we do.

☼ PPT 44

PG 21

Have you ever heard the phrase, "If you don't make time for your wellness, you'll be forced to make time for your illness"? This doesn't apply only to physical health. For Case Managers who do not make time for self-care, potential "illnesses" could include burnout, compassion fatigue, and vicarious trauma.

☼ PPT 45

Burnout is physical and emotional exhaustion caused by feeling powerless and overwhelmed at work.

Compassion fatigue is a diminished ability to empathize or feel compassion for others caused by exposure to those suffering from traumatic events.

Vicarious trauma is the profound shift in world view due to working with participants who have experienced trauma. This is when your fundamental beliefs about the world are altered and possibly damaged by being exposed repeatedly to traumatic material.

Self-Assessment Activity

☼ PPT 46

Purpose: Learners assess their own level of compassion satisfaction and potential risk for compassion fatigue.

Materials: Proqol - V Self-Assessment (learners printed from confirmation letter). Pen or pencil for each learner.
Estimated Length: 15 minutes

Directions to Trainer: Learners complete and score their own self-assessments. Play a 15-minute YouTube timer with quiet, relaxing music while learners complete the assessment.

Trainer Instructions to Learners: Take out the Proqol – V Self-Assessment you printed from your class confirmation letter. If you do not have this, please let us know in the chat and we will provide a link for you to access an electronic copy. Please note that the electronic copy is not fillable, so you will still need to record and score your answers on paper. We're going to take a self-assessment for you to gauge your own level of compassion satisfaction and see if you have any potential areas of concern. This assessment does not provide any type of diagnosis, and your score may change depending on the type of day you're having. When you're finished answering the questions, add up your score on the following pages. You have 15 minutes. If you do not finish completing or scoring your assessment, that's okay. You can complete it on your own after class.

Ask Was anyone surprised by their score? Unmute or type your responses in the chat. If so, what surprised you about your score?

If you have any concerns about your score, you may want to check out the CBT in the Learning Center titled, Secondary Trauma.

Self-Care Strategies

In addition to strategies for managing your time well and enforcing your boundaries, we'll look at some strategies for self-care.

It is important to try various self-care activities so that you find those that work best for you. Taking time for yourself should be enjoyable; if it feels like a chore, try something else.

PPT 47

PG 22

Read the list of self-care strategies in your participant guide, and put a star next to the activities you already do regularly.

Now go through the list again, and put a heart next to the activities you want to try. In a moment, we are going to send you to breakout rooms. With your group, come up with some additional items you would include on this list if you were providing self-care strategies for a new Case Manager. The person in your group whose middle name has the fewest letters will be the scribe and reporter. You will have 7 minutes.

Note to Trainer: Send learners to breakout rooms for 6 minutes with an additional 1-minute countdown.

Debrief:

Share your responses.

Possible Responses: Take breaks, Keep regular work hours and stop thinking about work when the business day is over, Find healthy hobbies, Go outside, Take a walk

Deep Breathing & Mindfulness

☼ PPT 48

One of the simplest things we can do to combat stress is to breathe. Deep breathing doesn't take long, doesn't require any special equipment, and can be done almost anywhere. Here's a chance for you to try it.

Note to Trainer: Read these bullets very slowly, with pauses in between each bullet to allow learners to complete the exercise.

- Sit up straight.
- Take a long, slow deep breath through your nose.
- If you are able, stand up.
- Take a deep breath, feeling the air going into your lungs.
- Put your hand on your abdomen, feeling it expand and contract with each breath.
- Put your hand on your chest, feeling it expand and contract with each breath.
- Make yourself aware of the path that the air is taking as it enters and leaves your body.
- Now I'm going to give you two minutes of quiet to focus on your breathing and notice how your body responds.

You can try deep breathing at your desk, when stuck in traffic, or anywhere you need to refocus.

Another easy self-care strategy is to practice mindfulness.

☼ PPT 49

Mindfulness is defined as simply paying attention to right now, on purpose, from a place of kindness and curiosity, and without judgement.

☼ PPT 50

PG 23

You can practice mindfulness through *meditation*. This could be as simple as sitting quietly and being aware of your breath. There also are many free apps and online resources for guided meditation.

Another way to practice mindfulness is through *yoga*. You could join a structured class, or practice in your own home by watching YouTube videos.

A third way to practice mindfulness is through *movement*. This could be walking, dancing, or martial arts, such as tai chi.

A fourth type of mindfulness activity is *gratitude journaling*. There is no wrong way to keep a gratitude journal, but experts recommend quality over quantity. It's better to be specific and write in depth with detail about one thing you are grateful for, rather than simply jotting down a laundry list of items.

Prioritizing Self-Care

PPT 51

PG 24

One of the most common excuses for a lack of self-care is, "I don't have time." However, self-care does not have to be time-consuming. Read the list of ideas in your participant guide for self-care activities that you can do in 2 minutes, 5 minutes, 10 minutes, and 30 minutes.

We want to hear your ideas. **Ask** What self-care activities do you have to add to one of these categories? Unmute or type your responses in the chat.

Note to Trainer: Use the text annotation tool to add learner ideas on screen. If learners are not providing many suggestions, use the following:

- *2 minutes – Say no to a new responsibility*
- *5 minutes – Enjoy a snack or make a cup of coffee/tea*
- *10 minutes – Read a non-work-related article*
- *30 minutes – Watch a show*

Connections

PPT 52

We've reviewed some ideas for how you can practice self-care, but it's not just about you. Self-care doesn't happen in isolation; you also need to maintain positive relationships. Self-care is as much about spending time in the company of others as it is about making time for ourselves. It is important to recognize that some of our connections may not be sources of support, and may, instead, weigh us down or contribute to our stress.

Personal Network Profile Activity

PPT 53

PG 25

Purpose: Learners create their own support network and evaluate strengths and weaknesses.

Materials: Personal Network Chart on PG 25

Estimated Length: 20 minutes
Directions to Trainer: Give learners a few minutes between each step of the instructions to complete that step before moving on to the next step.

Trainer Instructions to Learners: Let's examine your support network with an activity that comes from material developed by Wisconsin Department of Health Services, Division of Quality Assurance and the University of Wisconsin-Oshkosh Center for Community Development, Engagement and Training (CCDET) as part of the federal Caregiver Abuse and Neglect Prevention Project.

1. In each category, write the names of up to four people you turn to for support in that category. It's okay if you cannot come up with four people.
2. Assign each person a number, 1 through 5, based on how helpful they are. 1 = not helpful; 5 = very helpful.
3. Circle the categories where you feel that you need or would like more support.
4. Put an "x" next to members of your network who you rely on too much.
5. Put a star next to people you might rely on more often.

Debrief:
What struck you as you identified your support network?
Answers will vary depending on individual learners' strengths and experience.

Finding the Inspiration: Why Cube Activity

Working to help others can be stressful and exhausting. It may feel like you are being pulled in many directions and are trying to meet sometimes unreasonable demands. In the midst of this chaos and stress, it is helpful to take the time to step back and remember why you are doing this work, and what keeps you going in times of difficulty. We all have bad days at work, but there also are moments and days that remind you why you work in this field.

☼ PPT 54

PG 26-27

Purpose: Learners create a Why Cube as a physical reminder of their own motivation.

Materials: Cube and instructions on PG 26-27. To complete the cube after class, learners will need scissors and tape.

Estimated Length: 10 minutes

Directions to Trainer: Complete a cube prior to class to show as an example. Turn on your webcam to show the cube when you mention the example. Learners write their answer to each question on one square. After class, learners may choose to put the cube together by following the instructions in the PG. The questions from the PG are listed in italics below.

1. *What is the most rewarding moment at your job?*
2. *What do you love about your job?*
3. *Whose lives have you touched? (Initials only)*
4. *Why did you take your current job?*
5. *What is a compliment you have received from a co-worker or supervisor?*
6. *What is something you do well?*

Trainer Instructions to Learners: Read the questions on page 26 of your guide. Write your answers to these questions on the squares in the image on page 27, one answer per square. After class, you can follow the instructions in your guide to complete your cube, so it looks like our example. It may be helpful to keep your completed cube on your desk, as a reminder of your "why".

After you have finished writing down your answers in the squares, type your favorite part of your job in the chat.

Closing

☼ PPT 55

Effective time management, setting and maintaining professional boundaries, and practicing self-care will help you feel fulfilled in your role as a Case Manager, along with improving your case management skills.

Sentence Prompts

PPT 56

Let's close the day by hearing your take-aways. Read the sentence prompts on the screen, and decide which one you would like to complete. When you're ready, please share your thoughts with the group by unmuting or typing your response in the chat.

PG 30 - 46

The appendix of your participant guide contains a list of tools for you to use back at your office or at home as needed to help with time management, maintaining professional boundaries, and self-care.

We have provided a link to the course evaluation in the chat. Please complete this evaluation to provide us with your valuable feedback, and have a wonderful rest of your day.

Trainer Appendix A – Ethical Scenarios

Scenario 1 - Alaina:

You are meeting with a W-2 applicant, who is a mother of three children. She is facing the breakup of her marriage. She is very concerned about how her children will respond, what steps she can take to minimize the disruption to their lives, and how she will manage financially with the reduced income. Do you decide to relate your own experience of divorce and the parenting issues that followed? Explain your decision.

If groups choose to self-disclose, what is the purpose? It should only be done if it would be helpful to the participant. Did they use the A-O-A method?

Scenario 2 - Kenzie:

A favorite participant is removed from your caseload due to moving out of the area. After several years, you see her at a shopping mall. She offers to take you to the food court for lunch to show appreciation for all the help you provided during the time she was on W-2. Do you accept? Why or why not?

If groups choose to accept the lunch meeting, did they let the former participant pay for the meal? Would they pay for the meal? Would they each pay for their own meals? Because of the lapsed time, accepting the meal does not pose a boundary violation. However, what happens if the former participant needs to reapply for W-2? What if another current participant sees you eating with the former participant?

Scenario 3 - Darrel:

You have a participant who recently became a CMF after gaining employment at a small tax accounting business. He has shared with you that the business is struggling, and he does not know what he will do if the business fails. He asks to prepare your taxes this year. What do you say?

Exchanging money for goods or services with a current participant is generally considered a boundary violation. It could be seen as favoritism. If groups choose to decline the tax preparation offer, did they offer any other way to help out the participant? For example, could they allow him to advertise his business on a community bulletin board in the lobby?

Scenario 4 - Jayden:

Jayden is your neighbor's daughter. Your neighbor stopped by yesterday to tell you that Jayden is applying for services, as she desperately needs help finding a job. Your neighbor asks you to do anything you can to help her. Your neighbor helps you out a lot and has never asked for anything in return. When you get back to the office, you see 10 submitted applications via ACCESS. Jayden's application is 8th. It looks like she was able to select an interview appointment 3 days from now, but you did have a cancellation this afternoon. How will you proceed?

While you may feel a personal obligation to help your neighbor's daughter, you must follow policy and process applications accordingly. This includes treating each applicant and participant fairly. It may be best to talk out the situation with your supervisor and have a colleague process Jayden's application to avoid a potential conflict of interest.

- Some scenarios are modified from WEST CAP, Ethics and Boundaries in Helping Professions curriculum